

# **Attendant Care Meeting Agenda**

## **Wednesday – February 28, 2007**

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### **I. Welcome/Introductions**

### **II. Approval of Minutes**

### **III. Module Discussion: Hiring, Benefits and Background Checks**

### **IV. Overview of Additional Issues**

- Worker Training
- Tasks Delegated to Workers
- Attendant Rights and Responsibilities

### **V. Timelines/Objectives**

### **VI. Future Meeting Dates**

### **VII. Responsibilities for Next Meeting**

### **VIII. Adjournment**

# Consumer Directed Care – Attendant Care Sub-Group

Date of Meeting: February 28, 2007

Minutes Prepared By: Jakenna Lebsock

## 1. Purpose of Meeting

- Member Introductions
- Topics for Consideration – Training Module
- Identify Items Needing Further Research
- Define Meeting Framework

## 2. Attendance at Meeting

Name	Company
John Black	AHCCCS
Denise Chambers	P/GLTC
April Charpiot	Member
Fernando Cruz	ABIL
Gwen Dean	ABIL
Tony DiRienzi	SILC
Donna van der Zee	Pima Health
Joanne Helmer	Evercare
Jane Hjeldness	Heart Felt Help
Jakenna Lebsock	P/GLTC
Liz Toone	Yavapai LTC
David Besst	DES/DAAS
Absent:	

## 3. Meeting Notes, Decisions, Issues

The meeting began with a welcome from Gwen Dean and introductions from all group members. The minutes were approved from the previous meeting on 1/16/07. The major topic of discussion was the Personal Care Attendant (PCA) Training Module compiled by Gwen (shown below). The first question before reviewing the module was whether or not a handbook should be given to members/attendants when they enter the program. The unanimous decision was that there should be a joint member/attendant handbook that explains the program along with the roles and responsibilities of each party.

### CONSUMER-DIRECTED CARE PERSONAL CARE ATTENDANT (PCA) TRAINING MODULE

#### SECTION I – ORIENTATION

- |                                       |                      |
|---------------------------------------|----------------------|
| A. Definition: Consumer-Directed Care | (Steering Committee) |
| B. Mission                            | (Steering Committee) |
| C. Independent Living Philosophy      |                      |

A, B and C will be addressed at the next Steering Committee meeting to be held on March 28, 2007. Any suggestions for the definition, mission or philosophy should be sent to Jakenna Lebsock by Monday – March 26, 2007.

- There should be a single, consistent definition of consumer-directed care for Arizona.
- The mission should be all encompassing, applying to both consumers and attendants.
  - Improve the quality of life
  - Empower consumers
  - Increase community/in-home living
  - Ability to make choice about how one lives: what to do, when to do it
- In general, the manual should be as short and sweet as possible.
  - Goals should be included in the mission, but do not need to be listed separately.

D. Role of the Member

(Member Group)

- The member should be responsible for overseeing the hiring process, etc.; however, what system will be in place to make sure that the member does what is needed – check lists, paperwork, etc.
  - Will this be a case manager function?

E. Role of the Personal Care Attendant

(Attendant Group)

F. Consumer Rights and Responsibilities

(Member Group)

G. PA Rights and Responsibilities

(Attendant Group)

H. Overview of the CDC Program

(Attendant Group/Steering Comm.)

- We may want to create something short for the PCA to read to gain a better understanding of what the program is about. This would be good especially for those attendants who do not have previous experience in this field.

## SECTION II – HIRING

A. Application

- A standard application should be created for members to use when hiring attendants.

B. Interview

- The interview will be a responsibility of the member. A list of “best practices” questions should be devised as a reference for members if needed.

C. Job Description

- The job description should be the responsibility of the consumer. This will vary individual to individual.

D. Employment Contract/Service Agreement

- This should be a more formal version of the job description. The attendant and member should both have a clear understanding of what each will be receiving by signing the agreement.

E. Schedule

- The schedule should be agreed upon by the member and the attendant. The member needs to clearly communicate his or her wishes for when to receive services.

F. Timecard

- This should be provided by the FI in order to maintain consistency.

G. Pay Schedule

- This should be discussed between the member and attendant with the ultimate decision

coming from the FI in order to maintain consistency and ease of processing for all involved.

H. Contingency Plan

I. Emergency Procedures/Contacts

- Both H and I should be the responsibility of the consumer. The case manager should assist with H. I should be clearly communicated to the attendant as well as discussed with the case manager.

J. Skills Evaluation

- Consumers should make sure that attendants have the necessary skill sets to handle the job when they are hired. This includes general competency, ability to lift, communication skills, etc. as well as ability/willingness to be trained for desired skilled care tasks.

*General Comments/Thoughts from the Hiring Section:*

- This section will be reviewed by the Member-Related sub-group in order to see if they have any additions or suggestions.
- In order to make the program successful, this group feels that as many tools as possible should be available to the member.
- There also needs to be a clear process for handling those members that fail to meet the requirements of the program such as filling out the needed paperwork, etc.
- Peer support may be beneficial in developing many of the items required in this section, especially when it comes to examples.

*Q. Will the payment rates be different for emergency coverage? Could backup attendants possibly be paid more for the few hours of service that they provide?* This question has been passed along to the FI group for more information.

*Q. Are backup registries used in other states? Who maintains the registries? Would it be independently contracted? What effect will the registry have on agencies?* Jakenna will research the registry information and report back to the group at the next meeting.

### **SECTION III – PRE-EMPLOYMENT REQUIREMENTS**

A. Federal Criminal Background Clearance Card (Yes)

- The group is in agreement that background checks should be required; at least at the state level. It will be up to the member whether or not to hire a person based on how the check comes out.
- The Pinal County Sheriff's Department offers background checks; there would be a discounted rate if the checks are requested through the FI.
- *Will the time requirements for a background check hinder an attendant from working immediately?* This is being addressed by the Legal sub-group.
- Will there be a window of time that requirements can be completed in? Some background type questions should be asked in the interview so that the member can get a feel for the interviewee.
- *How will the CMS Exclusion List affect eligibility for attendants and who will oversee the list to make sure that all attendants are eligible to receive Medicaid money?* This is being addressed by the FI and Legal sub-groups.
- *What about an administrative fee? Would the background check be included in the fee?* All of these questions are being addressed by the FI and Legal sub-groups.
  - Will the fee be a set amount? Will it be based on the level of need of each client? Will it be based on the hours of care awarded?
  - If a client wants to advertise for an attendant, who will cover this cost? It is

- considered an administrative expense?
  - What happens if a consumer has high turnover – do the administrative costs go up? How is the additional cost accounted for? What about the time it takes to replace a caregiver?
  - Will the administrative costs be a percentage of the entire award or will it be above and beyond the service award?
  - If the cost isn't entirely used up, could it be applied towards additional services at the end of the quarter or year?
  - Could the FI send out quarterly financial statements to members so they know where they stand in terms of finances, budget, etc.?
- *Will backup people have to be signed up with the FI ahead of time? Will they be required to have background clearance and a TB test before they can be utilized?* This is being addressed by the FI and Legal sub-groups.
  - What will be the requirements for being on the backup registry?
  - Will all of these things be required if the member knows their chosen attendant well – i.e.: spouse, child, etc.
- Should credit checks be a requirement?
  - Some occupations are now requiring them for employment. They are probably not that important for this position; however, a bankruptcy could tell you something...
  - The group is in agreement that credit checks should not be a requirement.

#### B. References

(Best Practices)

- It would be ideal to have at least three references; two from a previous employer. However, this may not always be an option. They should be suggested as a “Best Practice” but it should be up to the consumer whether or not to require them.
- Would they be needed from family members/close family friends?

#### C. TB Test

(Yes)

- The group would like to see TB tests as a requirement of the program for the safety of both the attendants and the members.

#### D. Physical

(No)

- Physicals will not be a requirement of the program.

#### E. Tax Information: I9, W4, A4, Direct Deposit form, W2

(Fiscal Intermediary)

- The FI group will determine which forms will be necessary and make sure that they are provided – either as a part of the Member/Attendant handbook or provided after an attendant is hired.

#### F. CPR and First Aid

(Yes)

- This should be a requirement for all attendants. How will the costs of these trainings be covered?

#### *General Comments/Thoughts from the Pre-Employment Requirements Section:*

- *If this group decides on certain requirements and the Steering Committee agrees, will they be standard across the state? Will AHCCCS put them into the policies and procedures?* Each sub-group will be making suggestions on policies and procedures. P/GLTC representatives will compile them all and take them to the Steering Committee for approval. Once approved, they will move through the AHCCCS system and will become official AHCCCS policy once approved.
  - Do we have to go by the AHCCCS medical policy manual requirements? Or are we writing our own? (Writing our own)
- We might want to put together a list of “best practices” – recommendations for the consumers on how to

direct their own care. Legal requirements will be mandated, all other options should be a choice.

- *Should there be any kind of probationary period? Especially if attendants cannot pick up on specific kinds of care?* This should be an option for the consumer, but not a requirement.
- *What about if there is a language barrier?* If the consumer doesn't mind the challenge, it is their choice. This should not be regulated by policy.
- *What will be the exact process for hiring? Will a person come in and interview and then go somewhere else to deal with the FI? Will the consumer pass along FI forms and tell the attendant to mail them to the FI? How is the FI going to be structured?* These questions are being addressed by the FI sub-group.
  - The book for the attendants/consumers should include all needed forms.

## SECTION IV – BENEFITS

(Legal)

### A. Workers Compensation

- Ideally, this will be a program requirement in order to protect both the consumer and the attendant. Otherwise, what happens if an attendant gets hurt? Who is responsible and who will be sued?

### B. Unemployment Insurance

- The group agrees that this should not be a requirement unless the legal group says so.

The Legal group will be addressing both of these topics.

## SECTION V – TRAINING (this should be referenced in the handbook as well as provided formally)

### A. Member Specific Care

(Member)

### B. CPR/First Aid

(Non-member)

### C. Universal Precautions

(Non-member)

### D. Pressure Sores/Ulcers

(Non-member)

### E. Body Mechanics/Transfer Methods

(Combination)

### F. Managing a Safe, Clean and Efficient Environment

(Packet Handout)

### G. Abuse and Neglect

### H. Confidentiality and Privacy

### I. Communication

- The group suggests that members should provide their attendants with a “Things You Should Know About Me” information sheet, which would include nutrition requirements, allergies, DNR, etc. The Member-Related group will be discussing this at their next meeting.

### J. Advanced Health Care Directives

- The case manager will already be aware of these for each member. Wishes should be explained to the attendant. Discussing this with the attendant should be a “best practice” but does not have to be a requirement as long as the attendant has a general understanding.

### K. Emergency Preparedness

- It would be a “best practice” to have some sort of emergency preparedness form available for the attendant. It can hang on the member's refrigerator, by the phone, etc. and should include doctor info, case manager contact info, emergency contacts, and other important info.

*General Comments/Thoughts from the Pre-Employment Requirements Section:*

- Will there be official training for every topic or will some things in the manual to cover verbally (not so structured)?
- One of the attendant rights should be to know how to handle emergency situations in terms of what to

do, who to contact, etc. (This would be guaranteed through the use of an Emergency Response form provided by the member.

- Training will be needed to inform the consumer what should be done when hiring a new caregiver. How will the training be addressed – who will do it? How long will it take?
  - Could some of the training be done through a video or a PowerPoint, with a sign off at the end? Is this going to be a strict requirement or loose?
  - DDS can train informal caregivers for free. So does Pima Health.
  - Maybe an RFP for trainers that would be kept on hand when needed.
  - Should trainings be a monthly event? May need to find additional options for the rural area. If people have to wait 3-4 weeks to get training, will this hinder them from providing services until that point?
  - Will training take away from the hours of care a person receives a month?
- Could the FI offer training? Maybe as a one-day orientation that takes care of paperwork as well.

## **SECTION VI – SUPERVISION** (To be Covered at Next Meeting – 3/21/07)

- A. Supervisor (Member)
- B. Service Agreement
- C. Performance Evaluations
- D. Disciplinary Action

## **SECTION VII – DOCUMENTATION/REPORTING** (To be Covered at Next Meeting – 3/21/07)

- A. Timecard
- B. Care Provided

### **General Thoughts/Questions from the Group:**

- *How will the shortage of caregivers be addressed? What is the percentage of caregivers in other states that have been friends/family members? What happens if people already work 40 hours a week and then sign up for the registry and work even more hours? Will this be accounted for?*
- *Could a consumer choose to go through an agency to hire an attendant or would that defeat the point of the program?*
- *Where does sexuality fit into this program? Is it an option for discussion later on? Can it even be considered if it is not currently a service provision of AHCCCS? If so – it should be discussed with the attendant during the hiring process.*

### **Handouts:**

- PCA Training Module (please see above)
- Working Together: Consumer Personal Assistance Training manual
- Internet Resources
- Risk and Liability article

### **Suggested Readings for Next Meeting:**

- Consumer-Directed Personal Care Handbook (Arkansas) – please refer to the Internet Resources for location of electronic copy
- Working Together: Consumer Personal Assistance Training manual
- Any additional materials that may be of benefit when outlining the attendants' role and rights/responsibilities

#### 4. Action Items

<i>Action</i>	<i>Assigned to</i>	<i>Due Date</i>	<i>Status</i>
Role of the Attendant	All members	Will be discussed on 3/21/07	
Attendant Rights and Responsibilities	All members	Will be discussed on 3/21/07	
Use of backup registries in other states	Jakenna/April	3/21/07	

#### 5. Next Meeting

<i>Date:</i>	March 21, 2007	<i>Time:</i>	11:00-2:30	<i>Location:</i>	AHCCCS, 801 E. Jefferson – 4 <sup>th</sup> floor, Ocotillo Room
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